

CiviviCa

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This presentation uses the biggest font at CiviCon.

Agenda

- Intro
- Benefits of CiviCase
- Two brief case studies
- Change presenters

Benefits

- The three R' s
 - Regulatory Compliance
 - Reporting
 - Rlost cases
- Can' t we do this with just basic CRM?
 - Sure, but you will likely find yourself re-creating mechanisms that you get automatically with Cases.
 - Case = Container for Activities

Physician Health Program of BC

- Initial sponsors of CiviCase.
- Existing system working, but not flexible enough for requirements (reporting, different classes of users, security options, etc.)
- Important concept: Changes in state are because something happened, and recording the details are as important as recording the change in state. In CiviCRM activities were a good fit.
- CiviCRM people seemed nice.
- Case Type = Package of Services
- Let's look at an example...

Center for Patient Partnerships

- Provides advocacy services to people with severe illness.
- First-line intake performed by students – need way to record without classifying yet (default case type of “Triage”).
- Determination of what service to provide made by Coordinator:
 - Critical Advocacy: Quick help to meet a specific need.
 - One-on-One: Advocate assigned.
 - Self-Advocacy: Given referrals or resources. Put on wait-list for One-on-One.

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